

# CASE COMMENTS AND ABBREVIATIONS

## Case comments **SHOULD** include:

- What you did/action taken
- Date application, SMRF or renewal was received
- Method of application, SMRF or renewal receipt (i.e., Access, Paper, Telephone, etc.)
- Break in service information, if applicable
- Face to Face or phone interview
- Pertinent findings/reporting by customer
- Verifications received/processed
- What verification is pending
- When the verification is due
- Childcare provider info
- Shared placement info for childcare auths
- Schedules of parents for approved activities for CC auths
- Auxiliary (Supplement) information
- Names of the affected individuals for things like additions or deletions from case
- Names of employers when changes are made (ie: Client reports job end at McDonalds 7/10/13, last check received 7/20/2013).
- Telephonic signature INTID from Genesys

Your case comments should ideally follow the driver flow of the interview process and relay information to any other worker who may need to touch the case via Genesys if you are out of the office, or for QC purposes.

## Case comments **SHOULD NOT** include

- PRESCREENING items. List case important items as appropriate, but no need to list all items which do not apply to case (i.e. "not incarcerated, no UI, No SS, no CS, etc.) We only need to know about items
- Opinions or negative comments about client.
- Mistakes that you made or questions you have about how to process a case
- Question marks and exclamation points. If you are notating **Q?** or **?** for verification, that is fine, but do not document things like "Client says she never received the benefit?????????" This is not professional.

**\*\*REMEMBER\*\* Case comments are a permanent part of the case record and are used for fair hearings and can be subpoenaed.**

## Examples of complete and correct case comments:

**\*\*FS/BCP Renewal\*\*** Susan on phone for renewal. Reports herself and 2 sons in HH. Reports she is still employed with Arby's. CS updated per KIDS. No other income reported. Reports CCE, updated case. Rent updated per client. Telephonic signature completed INTID 1234567890. Pends for EI verification. Due 8/5/13. Explained change reporting requirements.

**\*\*FS/CC SMRFs\*\*** SMRFs due for June received 07/07/13. Break in service applies for FS. Updated FS request date to SMRF receipt date. Reports no changes other than rent. Updated rent. Would like to continue with same CC provider, Kindercare. Reports working M-F 8a-4p. Updated CS per CWW average. Pends for EI verification for CC. Due 07/25/13. FS/BCP ongoing.

\*CCC\* Joseph called to report new employment with Stoughton Trailers. Pends for EI verification due 07/31/13.

\*CCC\* Maria called to report she was laid off from Neesvigs. Reports not returning to this employer. Last worked 7/10, last PS received 07/22/2013. FS aux eligible for August 293-143 IQFS=150 aux keyed.

**COMMONLY USED ABBREVIATIONS/ACCEPTABLE ABBREVIATIONS FOR CASE COMMENTS**

EI=Earned Income	LM=Left Message
UI=Unearned Income	LTD=Last 30 days PS
UC/UIB= Unemployment Compensation	PPRF=Renewal Summary for MA
SEI=Self Employment Income	SEIRF=Self Employment Income Report Form
FS=FoodShare	SUE=Shelter and Utility Expenses
BCP/BC+=BadgerCare Plus	HH= Household
HC=Healthcare	CS=Child Support
MA=Medicaid/Medical Assistance	CSA=Child Support Agency
EMA=Emergency Medical Assistance	CSE=Child Support Expense
ID=Identification	CCE=Child Care Expense
CC=Childcare	PS=Priority Service OR Pay Stubs
FPOS/FPS=Family Planning Services	SSI=Supplemental Security Income
VM=Voicemail	SSRE=Social Security Retirement Income
OTP=Over the Phone	SSSC=Social Security Surviving Child Income
FTF= Face to Face	SSDI=Social Security Disability Income